

TOPIC 14: TIME AND LEAVE INQUIRIES AND REPORTS

The purpose of this topic is to become familiar with the different Time and Leave Management Inquiry Windows. Inquiry windows allow for easy viewing of employee leave balances, accruals, usage and time and attendance data.

At the end of this topic, you will be able to:

- Look up leave information for a particular employee
- Access any of the leave inquiry windows
- View Time and Attendance data for employees by a specific date or pay location
- View employees' work schedules by pay location



NOTES



INQUIRIES

Time and leave management inquiry windows can be used to view time and attendance data, leave activity including accruals and usage and current leave balances. Leave activity is updated with an accrual or usage whenever a document is processed. If a document is entered and processed on-line, the resulting leave activity can be viewed immediately on the leave management inquiry windows. If a leave document is processed in batch (including documents that are scheduled and processed in Time-To-Gross, and Automated Accrual documents that are created by the Automatic Accrual process) the resulting leave activity can be viewed after payroll has been run.

Time and Leave inquiry windows also allow access to view previous leave requests submitted by employees. They provide inquiry access to time and attendance data processed through timesheets. Some of the inquiry windows allow for the viewer to enter selection dates to view information for a specific time period.

Let's review some common inquiries related to time and leave.

- **Employee Leave Balance Inquiry (QLBL)** – This inquiry displays all of an employee's leave balances by leave category, category description, balance, amount basis (hours, days, weeks, etc.) of the balance, balance type (year-to-date, leave year-to-date, inception-to-date, etc.) and the number of the month the leave year ends.
- **Leave Accrual and Usage by Month Inquiry (QLAU)** – This inquiry displays a summary of an employee's particular leave category, current balance, accruals and usage by month for the year selected. As on other leave inquiry windows, this window displays the category's amount basis, balance type and year-end month.
- **Employee Leave Activity Inquiry (QLDT)** – This inquiry provides detailed leave activity for each leave event within a specified leave category. It displays a description of the leave category, the amount basis, the leave year-end month and a detailed activity for each leave event. It also identifies the document on which the leave event was submitted and the date it was processed.



NOTES



INQUIRIES

- **Timesheet Roster (QTRS)** – This inquiry displays employee current period and prior period timesheets for a given pay location and given pay period. Views may be based on a combination of the pay location and the pay period end date and/or employee name.
- **Leave Request by Employee Inquiry (QLRQ)** – This inquiry displays all the leave requests an employee has requested for a given period of time by leave category.

The following inquiry tables are only updated with information entered on the Current Period Individual Timesheet (CITS) and the Current Period Crew Timesheet (CREW).

- **Hours by Pay Location Inquiry (QHPL)** – This inquiry displays all the employees of a specific pay location and their time and attendance data for a specific day.
- **Hours by Employee Inquiry (QHRE)** – This inquiry displays time and attendance data entered for an employee for a specific date.
- **Hours Summary by Pay Location Inquiry (QHPS)** – This inquiry displays all the employees and their hour summaries within a given pay location for a specific date range.
- **Work Schedule by Pay Location Inquiry (QSCH)** – This inquiry displays all the employees' schedules within the specified pay location for a given week.

Now that the inquiries used for Time and Leave have been reviewed, let's look at each inquiry in more detail.



EMPLOYEE LEAVE BALANCE INQUIRY (QLBL)

Employee Leave Balance Inquiry

Name: CARRINGTON, LORETTA

Employee ID: 060 - 13 - 0001 Appointment ID: Category: Date: 08 / 00

	Category	Description	Balance	Amount Basis	Balance Type	Leave Year End Month
1	ANNUL	ANNUAL LEAVE	42.00	HOURS	ID	
2	FCOMP	FEDERAL COMPENSATORY TIME	4.30	HOURS	ID	
3	FMLA	FAMILY MEDICAL LEAVE	-16.00	HOURS	YD	12
4	HCOMP	HOLIDAY COMPENSATORY TIME	8.00	HOURS	ID	
5	LWOP	LEAVE WITHOUT PAY	-6.00	HOURS	YD	12
6	SCOMP	STATE COMPENSATORY TIME	4.00	HOURS	ID	
7	SICK	SICK LEAVE	42.00	HOURS	ID	
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EMPLOYEE LEAVE BALANCE INQUIRY (QLBL)

The Employee Leave Balance Inquiry (QLBL) window displays all of an employee's leave balances by leave category, category description, balance, amount basis (hours, days, weeks, etc.) of the balance, balance type (year-to-date, leave year-to-date, inception-to-date, etc.) and the number of the month the leave year ends.

Step 1 To open the QLBL from the SAM II Desktop Navigator window, click on the GO TO icon. Type **QLBL** in the **CODE**. Select OPEN.

Step 2 Enter an **EMPLOYEE ID** to begin the list. Type **060-13-0001**.

Select **DISPLAY: BROWSE DATA** to display the employee record.

Step3 Let's look at the fields to gain an understanding of each.

NAME – Inferred. Displays the employee's full name (last name, first name and middle initial).

EMPLOYEE ID – Required. Enter the employee's identification number for the employee to be displayed.

APPOINTMENT ID – Optional. If the employee holds more than one appointment, enter the appropriate appointment identification number for the employee. If this field is left blank, the employee data pertains to the employee's primary appointment.

CATEGORY – Optional. Enter a leave category code to display the balance of a particular category. Valid values are located on the Event Category (CATG) window. The code for the leave category is displayed. If this field is left blank, all leave categories are displayed.

DATE – Optional. Enter a date in **mm/yy** format to display data pertaining to a specific date. The current date is the default value.

CATEGORY – Inferred. Displays the leave category code.

DESCRIPTION – Inferred. Displays the description of the leave category.



EMPLOYEE LEAVE BALANCE INQUIRY (QLBL)

Employee Leave Balance Inquiry

Name: CARRINGTON, LORETTA

Employee ID: 060 - 13 - 0001 Appointment ID: Category: Date: 08 / 00

	Category	Description	Balance	Amount Basis	Balance Type	Leave Year End Month
1	ANNUL	ANNUAL LEAVE	42.00	HOURS	ID	
2	FCOMP	FEDERAL COMPENSATORY TIME	4.30	HOURS	ID	
3	FMLA	FAMILY MEDICAL LEAVE	-16.00	HOURS	YD	12
4	HCOMP	HOLIDAY COMPENSATORY TIME	8.00	HOURS	ID	
5	LWOP	LEAVE WITHOUT PAY	-6.00	HOURS	YD	12
6	SCOMP	STATE COMPENSATORY TIME	4.00	HOURS	ID	
7	SICK	SICK LEAVE	42.00	HOURS	ID	
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EMPLOYEE LEAVE BALANCE INQUIRY (QLBL)

Step 3 Let's continue to look at the fields to gain an understanding of each.

BALANCE – Inferred. Displays the leave balance the employee has left.

AMOUNT BASIS – Inferred. Displays the amount basis (i.e., hours, days, weeks, etc.) by which the employee accrues leave.

BALANCE TYPE – Inferred. Displays the type of balance (i.e., year-to-date, leave year-to-date, inception-to-date, etc.).

LEAVE YEAR END MONTH – Inferred. Displays the month the leave year ends.



LEAVE ACCRUAL AND USAGE BY MONTH INQUIRY (QLAU)

Leave Accrual and Usage by Month Inquiry

Name: **CARRINGTON, LORETTA** Employee ID: **060 . 13 . 0001** Appt ID:

Category: **ANNUL ANNUAL LEAVE**

Year: **00** Leave Year End Month: Balance Type: **INCEPTION-TO-DATE**

Amount Basis: **HOURS** Balance Amount: **82.00**

Leave Year	Month	Accrual	Usage
00	DECEMBER	10.00	0.00
00	NOVEMBER	10.00	0.00
00	OCTOBER	10.00	0.00
00	SEPTEMBER	10.00	0.00
00	AUGUST	10.00	8.00
00	JULY	10.00	0.00
00	JUNE	10.00	0.00
00	MAY	10.00	0.00
00	APRIL	10.00	0.00
00	MARCH	0.00	0.00
00	FEBRUARY	0.00	0.00
00	JANUARY	0.00	0.00



LEAVE ACCRUAL AND USAGE BY MONTH INQUIRY (QLAU)

The Leave Accrual and Usage by Month Inquiry (QLAU) window displays a summary of an employee's particular leave category, current balance, accruals and usage by month for the year selected. As on other leave inquiry windows, this window displays the category's amount basis, balance type and year-end month.

Step 1 To open the QLAU from the SAM II Desktop Navigator window, click on the GO TO icon. Type QLAU in the **CODE**. Select OPEN.

Step 2 Populate the following fields to narrow your search on the QLAU window.

NAME – Inferred. Displays the employee's full name (last name, first name and middle initial).

EMPLOYEE ID – Required. Enter the employee's identification number for the employee to be displayed. Type 060-13-0001.

APPOINTMENT ID – Optional. If the employee holds more than one appointment, enter the appropriate appointment identification number for the employee. If this field is left blank, the employee data pertains to the employee's primary appointment.

CATEGORY – Required. Enter the employee's leave category to be displayed. Valid values are located on the Event Category (CATG) window. Type ANNUL.

Select **DISPLAY: BROWSE DATA** to display the employee record.

Step3 Let's look at the fields to gain an understanding of each.

YEAR – Optional. Displays the current leave year unless a specific year is entered.

LEAVE YEAR END MONTH – Inferred. Displays the month the leave year ends.

BALANCE TYPE – Inferred. Displays the type of balance (i.e., year-to-date, leave year-to-date, inception-to-date, etc.).

AMOUNT BASIS – Inferred. Displays the amount basis (i.e., hours, days, weeks, etc.) by which the employee accrues and uses leave.



LEAVE ACCRUAL AND USAGE BY MONTH INQUIRY (QLAU)

Leave Accrual and Usage by Month Inquiry

Name: **CARRINGTON, LORETTA** Employee ID: **060 - 13 - 0001** Appt ID:

Category: **ANNUL ANNUAL LEAVE**

Year: **00** Leave Year End Month: Balance Type: **INCEPTION-TO-DATE**

Amount Basis: **HOURS** Balance Amount: **82.00**

Leave Year	Month	Accrual	Usage
00	DECEMBER	10.00	0.00
00	NOVEMBER	10.00	0.00
00	OCTOBER	10.00	0.00
00	SEPTEMBER	10.00	0.00
00	AUGUST	10.00	8.00
00	JULY	10.00	0.00
00	JUNE	10.00	0.00
00	MAY	10.00	0.00
00	APRIL	10.00	0.00
00	MARCH	0.00	0.00
00	FEBRUARY	0.00	0.00
00	JANUARY	0.00	0.00



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LEAVE ACCRUAL AND USAGE BY MONTH INQUIRY (QLAU)

Step 3 Let's continue to look at the fields to gain an understanding of each.

BALANCE AMOUNT – Inferred. Displays the leave balance the employee has left.

LEAVE YEAR – Inferred. Displays the year the leave was accrued and used by the employee.

MONTH – Inferred. Displays the month the leave was accrued and used by the employee.

ACCRUAL – Inferred. Displays the amount of leave accrued by the employee in the month.

USAGE – Inferred. Displays the amount of leave used by the employee in the month.



EMPLOYEE LEAVE ACTIVITY INQUIRY (QLDT)

Employee Leave Activity Inquiry

Name: CARRINGTON, LORETTA

Employee ID: 060 - 13 - 0001 Appointment ID:

Category: FMLA FAMILY MEDICAL LEAVE Balance Type: YD

Date: 08 / 00 Amount Basis: HOURS Leave Year End Month: 12

	Event Date	Actual Leave Type	Accrual Usage	Extended Usage Amount	Document Type	Agency	Document Number
1	08 09 00	ALSFM AL S/FMLA	U	8.00	PPER	300	PPERTL13002
2	08 08 00	SLSFM SL S/FMLA	U	8.00	PPER	300	PPERTL13002
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EMPLOYEE LEAVE ACTIVITY INQUIRY (QLDT)

The Employee Leave Activity Inquiry (QLDT) window provides detailed leave activity for each leave event within a specified leave category. It displays a description of the leave category, the amount basis, the leave year-end month and a detailed activity for each leave event. It also identifies the document on which the leave event was submitted and the date it was processed.

Step 1 To open the QLDT from the SAM II Desktop Navigator window, click on the GO TO icon. Type **QLDT** in the **CODE**. Select OPEN.

Step 2 Populate the following fields to narrow your search on the QLDT window.

NAME – Inferred. Displays the employee's full name (last name, first name and middle initial).

EMPLOYEE ID – Required. Enter the employee's identification number for the employee to be displayed. Type **060-13-0001**.

APPOINTMENT ID – Optional. If the employee holds more than one appointment, enter the appropriate appointment identification number for the employee. If this field is left blank, the employee data pertains to the employee's primary appointment.

CATEGORY – Required. Enter a leave category code to display the balance of a particular category. Valid values are located on the Event Category (CATG) window. Displays the leave category description. Type **ANNUL**, **SICK**, or **FMLA**.

BALANCE TYPE – Inferred. Displays the type of balance (i.e., year-to-date, leave year-to-date, inception-to-date, etc.).

DATE – Optional. Enter a date in ***mm/yy*** format to display data pertaining to a specific date. The current date is the default value. Type **08/00**.

Select **DISPLAY: BROWSE DATA** to display the employee record.

Step3 Let's look at the fields to gain an understanding of each.

AMOUNT BASIS – Inferred. Displays the amount basis (i.e., hours, days, weeks, etc.) by which the employee accrues and uses leave.



EMPLOYEE LEAVE ACTIVITY INQUIRY (QLDT)

Employee Leave Activity Inquiry

Name: **CARRINGTON, LORETTA**

Employee ID: **060 - 13 - 0001** Appointment ID:

Category: **FMLA** **FAMILY MEDICAL LEAVE** Balance Type: **YD**

Date: **08 / 00** Amount Basis: **HOURS** Leave Year End Month: **12**

	Event Date	Actual Leave Type	Accrual Usage	Extended Usage Amount	Document Type	Agency	Document Number
1	08 09 00	ALSFM AL S/FMLA	U	8.00	PPER	300	PPERTL13002
2	08 08 00	SLSFM SL S/FMLA	U	8.00	PPER	300	PPERTL13002
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EMPLOYEE LEAVE ACTIVITY INQUIRY (QLDT)

Step 3 Let's continue to look at the fields to gain an understanding of each.

LEAVE YEAR END MONTH – Inferred. Displays the month the leave year ends.

EVENT DATE – Inferred. Displays the date the leave was accrued or used.

ACTUAL LEAVE TYPE – Inferred. Displays the actual leave type that was accrued or used.

ACCRUAL USAGE – Inferred. Displays whether the leave event is *A* (accrual) or *U* (usage).

EXTENDED USAGE AMOUNT – Inferred. Displays the amount of accrued leave that was used by the employee.

DOCUMENT TYPE – Inferred. Displays the document type on which the leave event was submitted.

AGENCY – Inferred. Displays the agency (i.e., operating entity) under which the document was submitted.

DOCUMENT NUMBER – Inferred. Displays the document number that was used to submit the leave event.

PROCESS DATE – Inferred. Displays the date the document was processed.

ORIGINAL LEAVE TYPE – Inferred. Displays the original leave type, if any, the employee used. Original and actual leave type differs when leave has been substituted.



TIMESHEET ROSTER (QTRS)

Timesheet Roster

Pay Location: Pay Period End Date:

	Employee Name	Employee ID / Appointment ID	Batch ID	Document ID
1	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13001
2	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13002
3	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13003
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TIMESHEET ROSTER (QTRS)

The Timesheet Roster (QTRS) window displays employee current period and prior period timesheets for a given pay location and a given pay period.

Using this window, you have the choice of combining the pay location and the pay period end date and/or employee name. If you select on pay location alone, you receive a roster of all employees paid from that pay location at all existing pay period end dates. If you select on pay location and pay date, you receive a roster of all employees paid from that pay location for that specific pay period. Enter the employee's partial or full name to display timesheets starting at that employee.

NOTE: To appear on this inquiry, an employee must be assigned a pay location, this is also true for secondary appointments (i.e., there must be a pay location for the secondary appointment.) Pay location is assigned on either the Agency Specific and Accounting Data (AGYS) window or the Agency Specific Data (AGYD) window.

Step 1 To open the QTRS from the SAM II Desktop Navigator window, click on the GO TO icon. Type **QTRS** in the **CODE**. Select OPEN.

Step 2 Populate the following field to narrow your search on the QTRS window.

PAY LOCATION – Optional. Enter a specific pay location to see a summary of timesheets associated with a specific pay location. If no value is entered, all timesheet documents are displayed in order of pay location, employee name and pay period end date. The default value is *****. Type **8ACDH0**.

Select **DISPLAY: BROWSE DATA** to display the timesheets.

Step 3 Let's look at the fields to gain an understanding of each.

PAY PERIOD END DATE – Optional. Enter a pay period end date with a pay location to limit the scan of timesheets to those associated with a specific pay location and pay period end date. The default value is *****.

EMPLOYEE NAME – Optional. Enter the employee's name or partial name to position the beginning of the scan on a specific employee's information. The employee's full name (last name, first name and middle initial) is displayed.

EMPLOYEE ID/APPOINTMENT ID – Inferred. Displays the employee's ID.



TIMESHEET ROSTER (QTRS)

Timesheet Roster

Pay Location: Pay Period End Date:

	Employee Name	Employee ID / Appointment ID	Batch ID	Document ID
1	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13001
2	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13002
3	CARRINGTON, LORE	060130001	PPER 300	PPER 300 PPERTL13003
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TIMESHEET ROSTER (QTRS)

Step 3 Let's continue to look at the fields to gain an understanding of each.

BATCH ID – Inferred. Displays the batch transaction ID, agency and number for the batch in which the employee's timesheet was entered.

DOCUMENT ID – Inferred. Displays the document transaction ID, agency and number for the document on which the employee's time was entered.

DOCUMENT STATUS – Inferred. Displays the status of the document (accepted, scheduled for offline processing, etc.).

DOCUMENT APPROVALS – Inferred. Displays the level of approvals that have been applied to the document.

Step 4 If you highlight on a selected entry for an employee click on the "Open" button, the system will take you to the original timesheet.

[Leave Request by Employee Inquiry \(QLRQ\)](#)